A photograph of an industrial factory floor. In the foreground, there are several long, dark metal beams or pipes. In the background, a large robotic arm with red and blue joints is positioned over a work area. The arm is illuminated with a bright blue light, and there is a visible welding or cutting process. The factory structure is made of steel beams and has a high ceiling with various pipes and lights. The overall atmosphere is industrial and modern.

Industrial Automation In Spain

Market Research - January 2026

Now, for tomorrow



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Executive Summary

Market Expansion

\$1.18B → **\$1.62B**

Projected growth 2024–2032 with **CAGR 5.34%**

European Position

#3 Rank

In Europe for new robot installations (2024), surpassing France with **5,160 units**.

Growth Hotspots & Value Migration

Shift to Software-Led Value

Value is migrating from hardware-centric to software-led solutions (Industrial AI, Digital Twins, MES), driving higher margins.

Intralogistics Boom

Warehouse automation is the fastest growing segment (CAGR ~19.3%) driven by e-commerce and labor scarcity.

High-Growth Segments

Industrial AI (18.45% CAGR), Food & Beverage packaging (up to +34% in sub-segments), and high-compliance Pharma.

Structural Drivers & Ecosystem

Demographic Imperative

Projected loss of 2.6M workers by 2050 forces a shift from discretionary efficiency to mandatory automation.

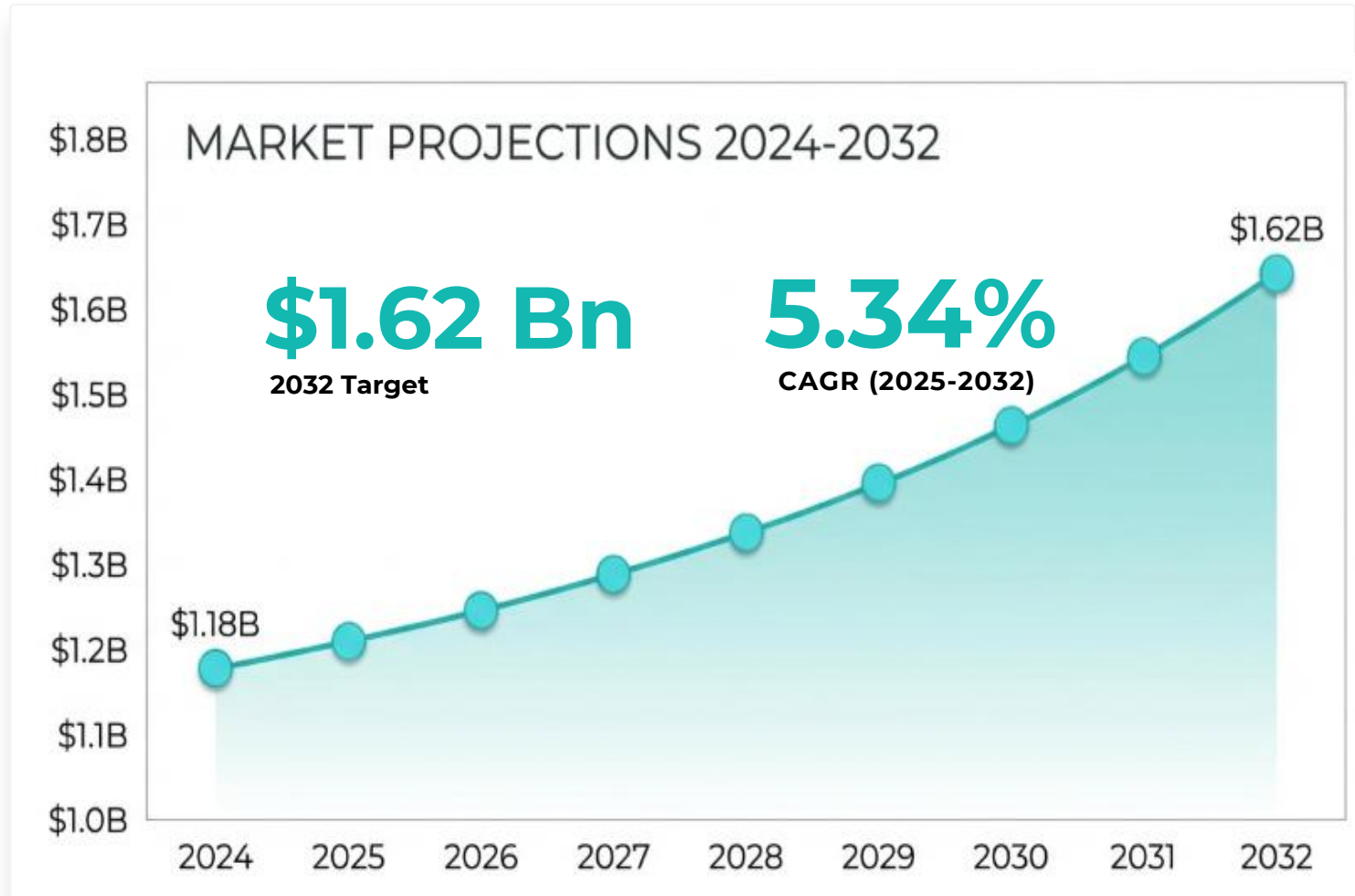
PERTE Funding Catalysts

Massive public injection: PERTE VEC (>€24B) for EV retooling & PERTE Chip (€12.25B) for semiconductor sovereignty.

Local Channel Dominance

~65 local System Integrators control the "last mile" of implementation. Trust, proximity, and regional support are key winning factors.

Market Growth Trajectory



High-Growth Challenger

Spain ranks as a top market in Europe, defying regional trends. Despite an 8% decline in EU installations in 2024, Spain installed **5,160 industrial robots**, moving into the top 3 and signaling robust mid-term demand across core industries.

Shift to Intelligence

Growth is pivoted toward **"Smart Manufacturing"** and **Industrial AI**. Fully-automated segments and Automated Storage and Retrieval Systems (ASRS) in F&B and logistics are supporting sustained double-digit growth in specialized niches.

Key Growth Drivers



Demographic Crisis

Spain is projected to lose **2.6M workers** by 2050.

Automation is no longer optional but a structural necessity to offset the widening skills gap and aging workforce.



PERTE Funding

Over **€77B** in EU funds mobilize modernization.

Specifically, PERTE VEC (€24.3B) and PERTE Chip (€12.25B) mandate advanced automation adoption for subsidies.



Wage Inflation

Rising labor costs and service-sector inflation drive capital substitution.

AI-driven solutions offer **20-30% efficiency gains** to maintain global competitiveness.



Nearshoring

Supply chain resilience is bringing production back to Europe.

Spain's plants must be **highly automated** to compete on cost with traditional low-wage regions.



Sustainability

Green automation is critical for ESG compliance.

Precision control systems reduce energy consumption and material waste, meeting strict **EU environmental mandates**.

Key Growth Trends



Collaborative Robotics

Rapid deployment in SMEs without safety cages. Ideal for **high-mix/low-volume production**, lowering the barrier to entry for automation.



AI-Driven Maintenance

Shift to predictive diagnostics using **"Physical AI"** and Generative AI pilots. Boosts uptime and addresses critical skilled labor shortages.



Green Automation

Precision sensing and control to minimize energy and material waste. Essential for meeting EU **"Green Deal"** and ESG compliance mandates.



Servitization (XaaS)

Transition from CAPEX to OPEX via **"Robotics-as-a-Service"**. Enhances financial agility and scalability for mid-market factories.



Edge & Private 5G

Low-latency local processing. Enables **real-time control** of mobile fleets (AMRs) and secure, high-speed plant synchronization.

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